



May 2009

# SCHOOL FINANCE UPDATE

*A Monthly Newsletter Published by the School Finance Division*

Denise Juneau, State Superintendent  
Montana Office of Public Instruction  
PO Box 202501  
Helena, MT 59620-2501

Phone (406) 444-3024  
FAX (406) 444-0509  
<http://www.opi.mt.gov>

This newsletter is emailed to school districts, county superintendents, county treasurers, and auditors each month. The newsletter is intended to reach all district staff involved in budgeting, accounting, enrollment, special education funding, and federal programs. Please forward it to all interested parties. Got suggestions for items to include here? We'd love to hear from you!

## Important June 1 Deadlines!

All public elementary, high school and K-12 districts which request approval of additional ANB for funding purposes must submit form PAA-3 by June 1. Section 20-9-313, MCA, lists the conditions when a district is eligible to apply for additional ANB.

### Anticipated Enrollment Increase

School districts may submit applications for an increase in ANB for FY2009-10 through June 1. Districts may be eligible for an increase if anticipated enrollments for FY2009-10 exceed average current year enrollment counts by more than 6%. OPI must review actual enrollment as of October 1, 2009 to verify approved increases actually materialized.

### Reopening an Elementary or High School

The County Superintendent of Schools must provide an estimate of enrollment for the reopened school for the ensuing year, including a clear explanation or documentation showing the basis for the estimate.

### Transition from a Half-Time to a Full-Time Kindergarten Program

School districts that intend to transition from a half-time to a full-time kindergarten program in FY2009-10 must indicate the anticipated percentage of kindergarten students to be offered a full-time program for FY2009-10 for each elementary budget unit.

**OPI contact: Nica Carte (406) 444-4401 or [ncarte@mt.gov](mailto:ncarte@mt.gov)**

## Time to Request Grant Cash!

It's time to review all district and cooperative grant projects to make sure your district has requested cash for all OPI-administered grant project funds. Delaying use of grant funding can result in losses if funds are not obligated by the deadlines.

Title V, Part D - Character Education ends **May 31**.

The following grants end **June 30**: IDEA Part B; IDEA Preschool; Carl Perkins; ESEA Title IV; Part B 21st Century Community Learning; State Gifted and Talented; Tobacco Use Prevention; Students with Significant Needs; IDEA State Professional Development; Adult Education and Literacy; Indian Education; and Learn and Serve.

Note: State Gifted and Talented projects are lagging this year in cash requested by this date, so please check to see if your district has unclaimed funds. Call Jurenne Fuchs at (406) 444-2560 if you have questions.

For grants administered through the E-Grants system, the last day to submit an amendment for projects that end June 30 is **June 1**. Please review your budgets by object code for each program to see if you need to re-budget dollar amounts. The E-Grants system allows a district to request cash up to 50% over a budgeted object code. If you need to request a greater percentage, please create and submit an amendment in E-Grants for OPI approval in order to

adjust the amounts by object code before you request cash.

The last day to submit an initial cash request in E-grants for projects that end June 30 is July 25, 2009. Fiscal closeout is due August 10.

OPI federal accountants are available for questions:  
Jurenne Fuchs, (406) 444-2560 or [jfuchs@mt.gov](mailto:jfuchs@mt.gov)  
Sunni Deter, (406) 444-3408, or [sdeter@mt.gov](mailto:sdeter@mt.gov)  
Charlotte McMilin, (406) 444-4403, or [cmcmilin@mt.gov](mailto:cmcmilin@mt.gov)

**OPI contact: Julia Dilly (406) 444-4523 or [jdilly@mt.gov](mailto:jdilly@mt.gov)**

### **FY2008-09 Second Semester Transportation Claims**

FY2008-09 2nd semester claims for reimbursement (TR-5 and TR-6) are due to the County Superintendent by May 10th and to OPI by May 24th. The payment will be made to school districts and counties on June 25, 2009.

Payment will be generated only on those routes where all documents are current and up-to-date in the transportation system. Please be sure to update all driver certificates (TR-35) that might expire during the period. Bus inspections (TR-13) for the second semester must have been completed by January 31, 2009 and entered into the transportation system.

**OPI contact: Maxine Mougeot (406) 444-3096 or [mmougeot@mt.gov](mailto:mmougeot@mt.gov)**

### **Pupil Transportation - Information Roll Over into FY2009-10**

School districts that are interested in planning their transportation budget for FY2009-10 can roll over the bus routes and individual contracts to the next year.

Instructions are posted on the OPI website at:  
[http://opi.mt.gov/PDF/PupilTransport/Rollover\\_Transportation.pdf](http://opi.mt.gov/PDF/PupilTransport/Rollover_Transportation.pdf)

**OPI contact: Maxine Mougeot (406) 444-3096 or [mmougeot@mt.gov](mailto:mmougeot@mt.gov)**

### **Getting Ready for FY 2009-10 E-Grants Applications**

Release of E-Grant applications for FY 2009-10 has been delayed due to American Recovery and Reinvestment Act (ARRA) requirements and Congress' late action on the appropriation bills to determine preliminary applications. OPI intends to open the "regular" FY 2009-10 ESEA/NCLB and IDEA Consolidated E-Grant applications on May 20, 2009. The ARRA ESEA/NCLB and ARRA IDEA E-Grant applications will be released shortly after the "regular" applications.

To help prepare for the FY 2009-10 grant application cycle, please see the memo located at this link: <http://www.opi.mt.gov/pdf/egrants/Documents/2010%20Preparing%20for%20E-Grants.pdf>

OPI plans to use Adobe Connect to provide E-Grants training shortly after the applications are released. The sessions will be recorded and posted to the OPI website for viewing at your convenience. Please watch for an official email announcing the training schedule.

**OPI contact: Kellee English, (406) 444-7841 or [kenglish@mt.gov](mailto:kenglish@mt.gov)**

### **"Quick Start" Grants**

The 2009 Legislature appropriated \$15M of Federal Stimulus money to the Department of Commerce (DOC) for "Quick Start" grants to school districts.

The website with more information and application materials is located at:  
<http://commerce.mt.gov/QuickStart/>

**For more information, contact: [Kali Wicks, Dept. of Commerce](#), (406) 841-2700**

### 2009 Summer Accounting and Budgeting Workshops

Save the date!

The OPI School Finance Division Summer Accounting and Budgeting Workshops are scheduled for the following dates and locations:

July 14 in Sidney  
July 15 in Miles City  
July 16 in Billings  
July 17 in Bozeman  
July 21 in Missoula  
July 22 in Kalispell  
July 23 in Havre  
July 24 in Great Falls

Registration and an agenda will be posted to the OPI website soon.

**OPI contact:** Adam Anfinson (406) 444-4524 or [aanfinson@mt.gov](mailto:aanfinson@mt.gov)

### Cooperative Purchase Food Bid Order Due June 1, 2009

School districts may place a cooperative bid order for FY 2009-10 through June 1, 2009. Resources available on the School Nutrition Programs website are shown below:

Instructions for ordering for Fall 2009-10 Cooperative Food Bid:

[http://www.opi.mt.gov/pdf/schoolfood/CPProg/09\\_10CPOrdering.pdf](http://www.opi.mt.gov/pdf/schoolfood/CPProg/09_10CPOrdering.pdf)

List of new items available on the bid:

<http://www.opi.mt.gov/pdf/schoolfood/CPProg/09AprCoopBidNews.pdf>

Instructions for using the on-line order system:

<http://www.opi.mt.gov/pdf/schoolfood/CPProg/CPOrderInstructions.pdf>

Access to on-line order system: <http://data.opi.mt.gov/CooperativePurchasing/Login.aspx>

**OPI contact:** Teresa Motlas, (406) 444-2501 or [tmotlas@mt.gov](mailto:tmotlas@mt.gov)

### Fresh Fruit & Vegetable Program News

Districts that intend to participate in the Department of Defense (DOD) Fresh Fruit and Vegetable Program should notify OPI by May 30, 2009. Sign up information is available at this link: [http://www.opi.mt.gov/pdf/schoolfood/ffvp/2010DOD\\_SignupLtr.pdf](http://www.opi.mt.gov/pdf/schoolfood/ffvp/2010DOD_SignupLtr.pdf). Sign up information helps OPI to determine entitlement amounts for each participating district.

**OPI contact:** Teresa Motlas, (406) 444-2501 or [tmotlas@mt.gov](mailto:tmotlas@mt.gov)

### AIM End of Year Collection – May 11 to June 19, 2009

The AIM End of Year Collection takes place from May 11 to June 19, 2009. AIM specialists should enter an enrollment end date and end status for all students currently enrolled in the school. This will end the student's enrollment record for the current 2008-09 school year. Specific instructions and training opportunities about how to roll calendars forward in the AIM Montana Edition will be posted soon on the AIM webpage at

<http://www.opi.state.mt.us/AIM/Index.html>

Graduation data, which includes diploma date, diploma type and diploma period, should be entered at this time. Additional information including reference guides for this collection and specific instructions on data entry is available at:

<http://www.opi.mt.gov/pub/aim/AIM%20Collections/End%20of%20Year%20Collection/>.

Please contact the AIM Helpdesk at 1-877-4AIMMT1 (1-877-424-6681) or [opiainhelp.mt.gov](mailto:opiainhelp.mt.gov) if you have any questions. For more information, contact Nicole Weissman at (406) 444-3495.

**OPI contact:** Sara Loewen, (406) 444-3494 or [sloewen@mt.gov](mailto:sloewen@mt.gov).

## Useful Links

State Entitlement Payments to Schools:

<http://www.opi.mt.gov/PUB/School%20Finance/Payments/>

School Accounting: <http://www.opi.mt.gov/SchoolFinance/Acct.html>

Forms and Publications: <http://www.opi.mt.gov/SchoolFinance/Enrollment.html>

Pupil Transportation: <http://www.opi.mt.gov/PupilTransport/index.html>

Enrollment and ANB: <http://www.opi.mt.gov/SchoolFinance/Enrollment.html>

Tuition: <http://www.opi.mt.gov/SchoolFinance/Forms.html>

Audit Information: <http://www.opi.mt.gov/SchoolFinance/Audit.html>

School Finance Calendar: <http://www.opi.mt.gov/calendar/calendar.php?calendar=2>

Summary of OPI Activities: <http://opi.mt.gov/OPISummary/>

## School Finance Division Staff

Nica Carte [ncarte@mt.gov](mailto:ncarte@mt.gov)

Janelle Graybeal [jgraybeal@mt.gov](mailto:jgraybeal@mt.gov)

Rebecca Phillips [rphillips2@mt.gov](mailto:rphillips2@mt.gov)

Paul Taylor [ptaylor2@mt.gov](mailto:ptaylor2@mt.gov)

Adam Anfinson [aanfinson@mt.gov](mailto:aanfinson@mt.gov)

Kathleen Wanner [kwanner@mt.gov](mailto:kwanner@mt.gov)

Denise Ulberg [dulberg@mt.gov](mailto:dulberg@mt.gov)

Donell Rosenthal [drosenthal@mt.gov](mailto:drosenthal@mt.gov)

Maxine Mougeot [mmougeot@mt.gov](mailto:mmougeot@mt.gov)



**May's a month of happy sounds,**

**The hum of buzzing bees,**

**The chirp of little baby birds**

**And the song of a gentle breeze.**

